

## **APPENDIX C – IFB FORMATS**

C-1 – Standard IFB Form

C-2 – Special IFB Format for Insurance

## APPENDIX C-1 - Model Invitation for Bids (IFB)

### INVITATION FOR BIDS

#### IFB

Issue Date: (Date) IFB #(Number)

Title: (Commodity or Service)

Issuing Agency: \_\_\_\_\_ Community Services Board  
(Mailing Address)

Delivery Points: (Address of delivery point(s) or city/town to which deliveries may be made under any resulting contract.

Period of Contract: (Date) through (Date) *If the purpose of the IFB is not to establish a term contract, this section may be replaced by the required delivery date or the section may be deleted.*

Sealed Bids will be received until (Date and Time) for furnishing the goods described herein and then opened in public.

Indicate IFB number and opening date and hour on envelope.

All inquiries for information should be directed to:  
(Procurement Office and Phone Number)

IF BIDS ARE MAILED, SEND DIRECTLY TO ISSUING AGENCY SHOWN ABOVE. IF BIDS ARE HAND DELIVERED, DELIVER TO: (Location or Street Address)

PRE-BID CONFERENCE: A (mandatory) (optional) pre-bid conference will be held on \_\_\_\_\_ at the \_\_\_\_\_ (location) \_\_\_\_\_. Refer to Paragraph 3.0 herein.

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In compliance with this Invitation for Bids and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods at the price indicated in the Quotation Section 7.0.

Name and Address of Firm:

_____	Date: _____
_____	By: _____
_____	Signature in Ink
	Title: _____
_____ Zip Code _____	Telephone Number: (____) _____
FEI/FIN No. _____	FAX Number: (____) _____

\* Contractor \_\_\_\_ DOES \_\_\_\_ DOES NOT consider his firm to be a minority owned business.  
Contractor \_\_\_\_ IS \_\_\_\_ IS NOT certified as a minority business by the Virginia Department of Minority Business Enterprise.

\* Optional Information: Minority contractors are encouraged to submit bids; however, minority status does not influence award.

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- 1.0. **PURPOSE:** The intent and purpose of this Invitation for Bids is to establish a contract with one qualified firm to provide (Commodity) to the \_\_\_\_\_ Community Services Board.

***(NOTE: A purpose statement is not necessary for routine purchases of goods or services where it is readily apparent from the product or service what is wanted.)***

- 2.0 **SCOPE OF WORK or DESCRIPTION OF ITEM:** *(Describe in complete detail the service to be performed, or that which is to be purchased, including quantity, as applicable. Specifications or drawings, if applicable, may be referenced and attached. This is the section on which bidders base their quotations; therefore it must be complete and accurate.)*

**EXAMPLES OF WORDING THAT MAY BE USED TO BEGIN THIS SECTION:**

- A. **GOODS (FURNISH ONLY):** The Contractor shall furnish and deliver each of the following described item(s):
1. *(The purchase description(s) must be complete and specify the minimum needs of the CSB. Specifications may allow for bidding on a brand name or equal basis, if applicable.)*
  2. *(Other items that should be addressed in the purchase description or in the Special Terms and Conditions, as appropriate, include but are not limited to: inside delivery; set up and assembly; removal of trash; warranty; maintenance; packaging; etc.)*
- B. **GOODS (FURNISH AND INSTALL):** The Contractor shall provide all labor, supervision, equipment, tools, materials and incidentals necessary to furnish and install (state product). All equipment, materials and installation work shall comply with this specification, the Virginia OSHA Standards, and the Virginia Uniform Statewide Building Codes.

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C. **SERVICES:** The Contractor shall furnish all labor, supervision, equipment, tools, parts and materials, as necessary, to maintain the type of equipment listed in accordance with manufacturer's service manuals (or other).

1. *(Ensure that the scope of work is complete. The Contractor cannot be required to perform omitted work items.)*
2. *(Other items that should be addressed, as appropriate, include but are not limited to: repair response time; contractor certification-license requirement; workmanship; repair and maintenance records; working hours; response time; overtime; agency furnished materials; etc.*

**3.0 PRE-BID CONFERENCE:** *(If a pre-bid conference is desired, indicate date, time, place and whether attendance is mandatory or optional. See Appendix E, Section II for pre-bid clause.)*

**4.0 GENERAL TERMS AND CONDITIONS:** *(General Terms and Conditions must be used for every solicitation. These are those terms and conditions that are applicable to all IFBs or RFPs issued by the CSB. Those that are generally required are listed in Appendix E, Section I and can be entered into the CSB word processing system or printed separately and attached to the IFB. If attached, they should be referenced in this section of the IFB. Note that for some General Terms and Conditions, there are one or more optional clauses. You should choose those that best meet your requirements.)*

**5.0 SPECIAL TERMS AND CONDITIONS:** *(These are terms and conditions which are specific to the particular IFB. Therefore, different Special Terms and Conditions may be selected for each solicitation. They may be selected from Appendix E, Section II and III.)*

- 6.0 METHOD OF PAYMENT:** *(Specify when payment will be made, i.e., upon delivery, monthly, quarterly, completion of project, etc. In addition, specify when and where invoices are to be submitted, i.e., by the 10th of the month following the month services were rendered, upon shipment, completion of project, etc.)*
- 7.0 PRICING SCHEDULE:** *(Provide space for and specify how price is to be submitted, i.e., lump sum, hourly rate, unit price, etc. For example: Lump Sum \$ \_\_\_\_; Each \$ \_\_\_\_\_. Quantities may also be included in this section. In addition, optional quotes may also be requested. For example, one quote if the award is made on a lump sum basis and another if it is split between one or more providers.)*
- 8.0 ATTACHMENTS:** *(List all applicable attachments with a brief statement of their purpose. For example: Contractor Data Sheet asks for the bidder's number of years in business and a specified number of references.)*

## **APPENDIX C-2 – MODEL INSURANCE IFB**

The following IFB format may be used when the buyer knows the specific type and amount of insurance needed. See Section 35.300 of this Manual

The General Terms and Conditions, as well as any Special Terms and Conditions that may be needed, must be added to this IFB.

## APPENDIX C-2 – MODEL INSURANCE IFB

The following IFB format may be used when the buyer knows the specific type and amount of insurance needed. Prior to soliciting bids, however, CSBs should review the coverage available through the Division of Risk Management. See Section 35.300 of this Manual.

The General Terms and Conditions, as well as any Special Terms and Conditions that may be needed, must be added to this IFB.

*(Insert IFB Cover Page – See Appendix C-1)*

1.0 **PURPOSE:** The purpose for this Invitation for Bids (IFB) is to solicit sealed bids to from qualified insurance agents to provide the insurance coverages listed in Section 2.0 – Scope of Services.

2.0 **SCOPE OF SERVICES:** The Contractor shall provide insurance coverage based on the following requirements:

2.1 Property insurance is to be provided on items listed in Exhibit B. Coverage is to protect against risks of direct physical loss. Property coverage will also protect against the need for additional expenses or the loss or reduction of income resulting from loss to property. This coverage is to include electronic data processing equipment. Coverage is to be blanket on all real and personal property with an agreed amount endorsement. The per occurrence deductible is to be \$1,000. The values on Exhibit B represent at least 90% of the insurable replacement cost values unless otherwise stated.

*(For CSB use: It will be necessary to provide a valuation of the real and personal property. This should reflect the cost to replace the damaged property with that of like, kind and quality. A separate valuation should be show for electronic data processing equipment and the additional expense or loss of income.)*

2.2 Liability coverage for both Commercial General Liability and various Professional Liability/Errors and Omissions/Directors and Officers Liability.

*(For CSB use: The nature of the organization, operations and staffing will dictate the type of insurance needed. If the CSB does not use the DRM program, this will necessitate several coverages.*

2.3 Fidelity coverage on Coverage B with a limit of \$\_\_\_\_\_.



*(For CSB use: This amount will need to be determined by the CSB. It may be necessary to contact the current insurance agent to determine the appropriate amount.)*

- 2.4 Money and Securities coverage with a limit of \$\_\_\_\_\_ for losses inside the premises and \$\_\_\_\_\_ for losses outside the premises.

*(For CSB use: The CSB will need to determine its average amount of money and negotiable securities on hand and carried by messenger.)*

- 2.5 Workers' compensation to comply with the statutory provisions of the Commonwealth of Virginia.

- 2.6 Valuable papers and records coverage to pay for the cost to restore and reconstruct important documents.

*(The CSB will need to determine if it has such records. Then determine the cost to restore the records.)*

- 2.7 Power equipment and machinery coverage to protect against physical damages to and loss of equipment, which generates, transmits or uses energy. The deductible for this coverage should be concurrent with the property deductible.

*(This limit should be at least the same as the largest location listed in Exhibit A.)*

- 2.8 Automobile coverage to protect against liability imposed by law for losses resulting from the operation of owned, leased or rented vehicles. If employees use their vehicles for CSB business, automobile coverage should include non-Owned and hired automobile coverage. If physical damage coverage is desired, this should also be covered.

## EXHIBIT A

### Coverage History

This exhibit should contain at least three years history of insurance coverage. Items to be listed are insurance companies providing coverage, policy limits, deductibles, premiums and losses. If there have been no losses, this should be stated. Loss history should include the date of occurrence, amount of loss,

location of occurrence, cause and extent of injury or damage. Information on current litigation may not be available and this should be so stated.

Often coverages are arranged as a “package policy”. As much as possible, loss experience of the different elements of the “package” should be broken out. The should be arranged by:

- Property
- General Liability
- Professional Liability
- Fidelity/crime
- Workers’ Compensation
- Valuable papers and records
- Power equipment and machinery (boiler and machinery coverage)
- Automobile coverage
- Others as purchased

## EXHIBIT B

### Property Exposures

This should be a list of the buildings owned or occupied by the CSB. This allows evaluation of the property, power equipment and some liability exposures. Items to be included:

- Building name (if any)
- Street address (not P. O. Box)
- Values of owned buildings to be insured. Do not include land costs.
- Contents values. This should provide a breakout of IT equipment.
- Rental values received by CSB from tenants in any buildings or paid to any lessor in which CSB is a tenant. Also to be included are estimates of costs for CSB to operate from existing building use (office, apartment clinic, storage, etc.)
- Gross/external square feet if the building is owned by CSB. If only a tenant, then provide the square feet for the occupied area.
- Number of stories.
- Any loss detection or suppression in the building (smoke or heat alarms, burglar alarms, automatic sprinkler systems).
- Year building was constructed. If there has been significant renovation since construction, the year and extent of renovation should be described.
- If there are records essential to CSB operations, which would be difficult to reconstruct or replace, these should be identified and shown as a separate item from the contents. If these have been duplicated and copies stored elsewhere, this information should be included.

## EXHIBIT C

### Staffing

This shows the CSB organization, functions, job titles, and number of persons in each job and reporting relationships. Volunteers and part-time employees should be identified. This assists evaluation of liability, workers' compensation and fidelity exposures.

## EXHIBIT D

### Automobile Exposures

This is a list of all automobiles to be insured. Information needed is the year, make, model, vehicle identification number and approximate annual mileage of each vehicle. If employees use their own automobiles, coverage for hired and non-owned automobiles should be included. If physical damage coverage is to be included, the original new cost new of the vehicles is needed.